

Charity Choice

Concept

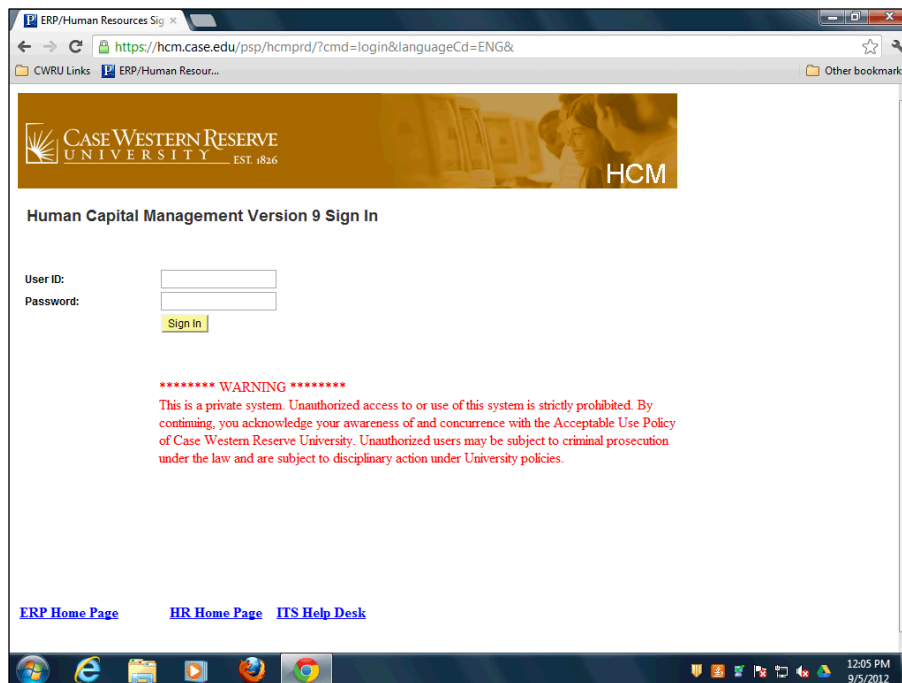
The Charity Choice campaign allows participating employees to donate to a preferred charity using monthly payroll deductions and will also track contributions made by personal check. Charity Choice recipients can be selected using the Human Capital Management (HCM) system.

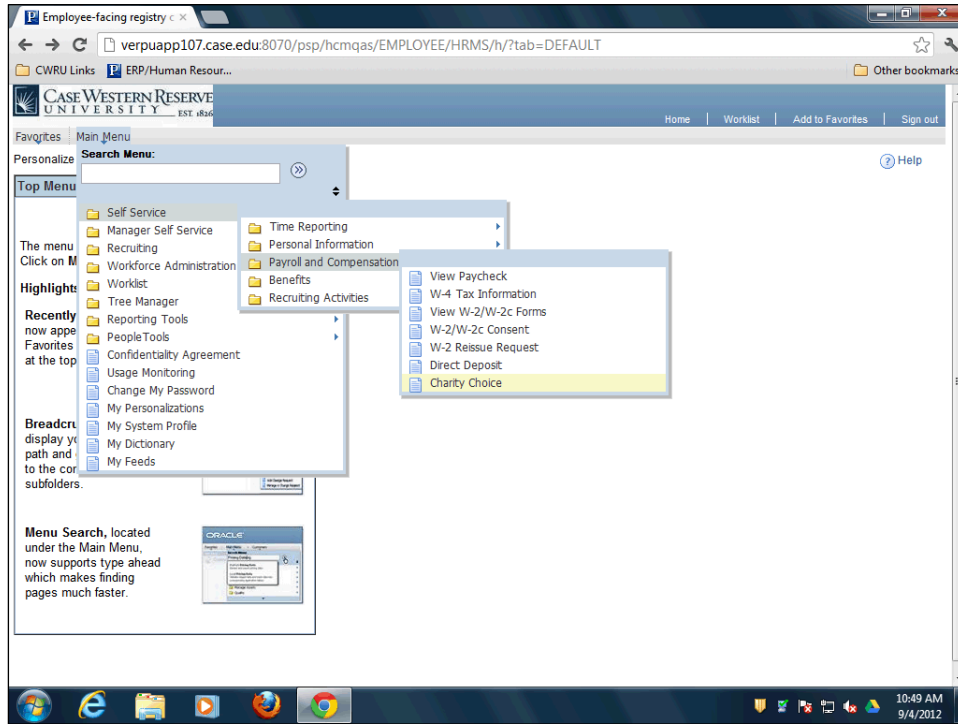
At the end of each contribution period, participating employees can add new charity contributions or copy previous contributions to be used for the upcoming year. To continue existing contributions into a new year, employees must access the HCM system and select the desired charity organization(s).

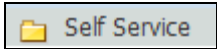
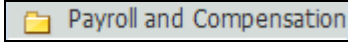
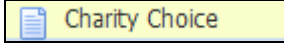
Participants can view their Charity Choice contributions throughout the year in HCM, but changes can only be made during the specified campaign enrollment period. Charity Choice enrollment periods vary slightly from year to year, but will generally occur from the middle of September to the middle of December.

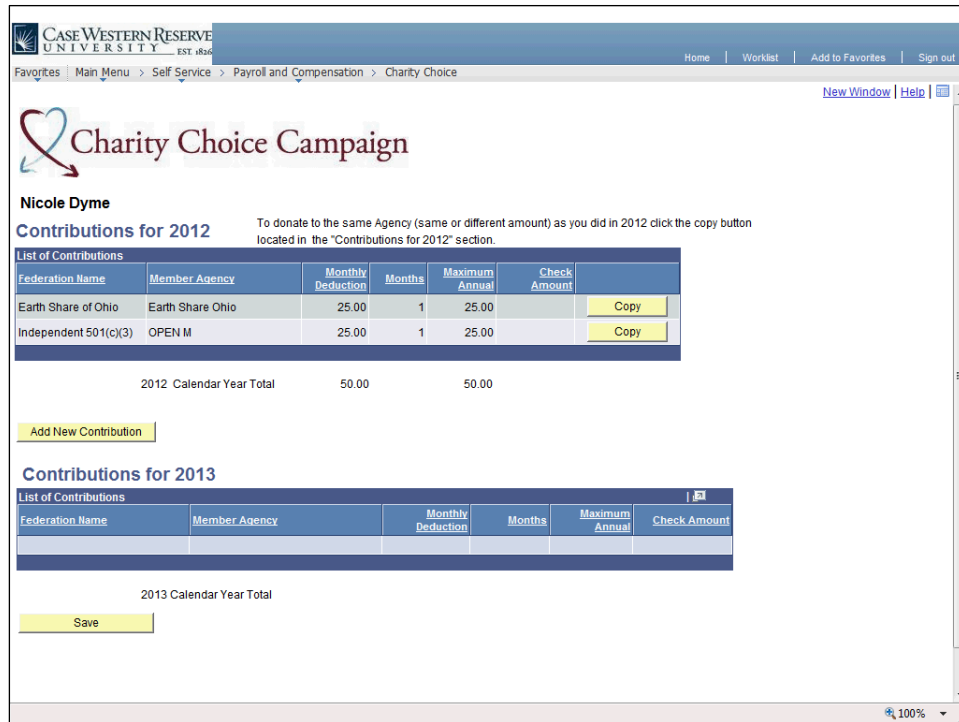
Procedure

To set up a Charity Choice donation, begin by logging in to the HCM system at [case.edu/hcm](https://hcm.case.edu/hcm) with your CWRU Network ID and password.

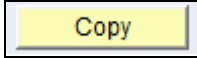


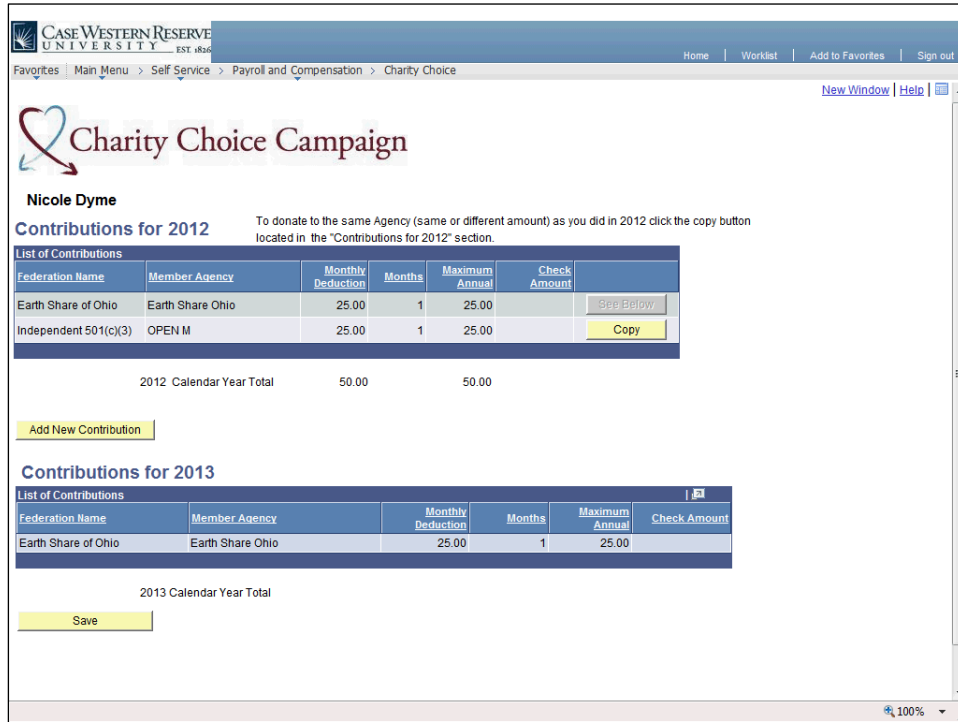


Step	Action
1.	From the HCM main menu, click the Self Service link. 
2.	Click the Payroll and Compensation link. 
3.	Click the Charity Choice link. 

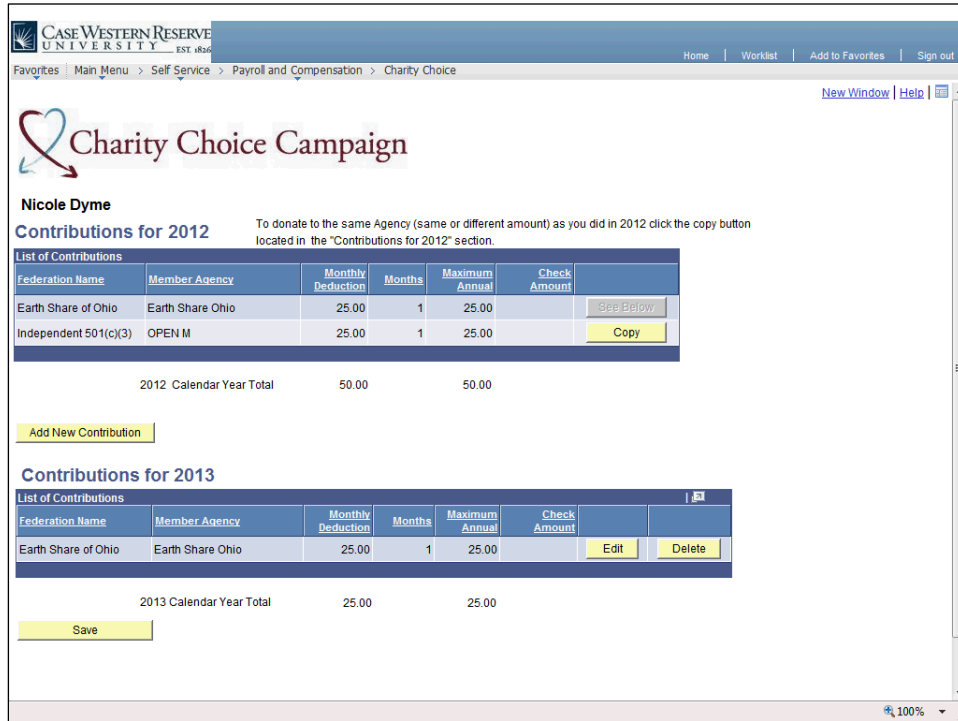


The screenshot shows the 'Charity Choice Campaign' page for user Nicole Dyme. It features a navigation bar at the top with links for Home, Worklist, Add to Favorites, and Sign out. Below the navigation, there are links for Favorites, Main Menu, Self Service, Payroll and Compensation, and Charity Choice. The main heading is 'Charity Choice Campaign' with a heart icon. The user's name 'Nicole Dyme' is displayed. A section titled 'Contributions for 2012' includes a note: 'To donate to the same Agency (same or different amount) as you did in 2012 click the copy button located in the "Contributions for 2012" section.' Below this is a table with columns: Federation Name, Member Agency, Monthly Deduction, Months, Maximum Annual, and Check Amount. Two rows are shown: 'Earth Share of Ohio' and 'Independent 501(c)(3) OPEN M'. Each row has a 'Copy' button. Below the table is a summary row: '2012 Calendar Year Total' with values 50.00 for Monthly Deduction and 50.00 for Maximum Annual. An 'Add New Contribution' button is located below the table. A second section titled 'Contributions for 2013' shows an empty table with the same columns. Below it is a '2013 Calendar Year Total' section with a 'Save' button. The bottom right corner shows a zoom level of 100%.

Step	Action
4.	<p>The Charity Choice Campaign screen appears. Your contributions for the previous year will be listed at the top of the screen.</p> <p>Below the list of previous contributions, there is an area reserved for the upcoming year.</p> <p>To copy contribution details from the previous year to the upcoming year, click the Copy button.</p> 



Step	Action
5.	<p>Your contribution details will now appear under the list for the upcoming year.</p> <p>Click the Save button.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block; background-color: #ffff00;">Save</div>
6.	<p>The Charity Choice Save Confirmation screen appears.</p> <p>Click the OK button.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block; background-color: #d3d3d3;">OK</div>



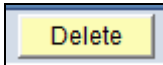
The screenshot shows the 'Charity Choice Campaign' page for Nicole Dyme. It features two sections: 'Contributions for 2012' and 'Contributions for 2013'. Each section contains a table of contributions with columns for Federation Name, Member Agency, Monthly Deduction, Months, Maximum Annual, and Check Amount. The 2012 section includes a 'Copy' button for the second entry. The 2013 section includes 'Edit' and 'Delete' buttons for the first entry. A 'Save' button is located below the 2013 table.

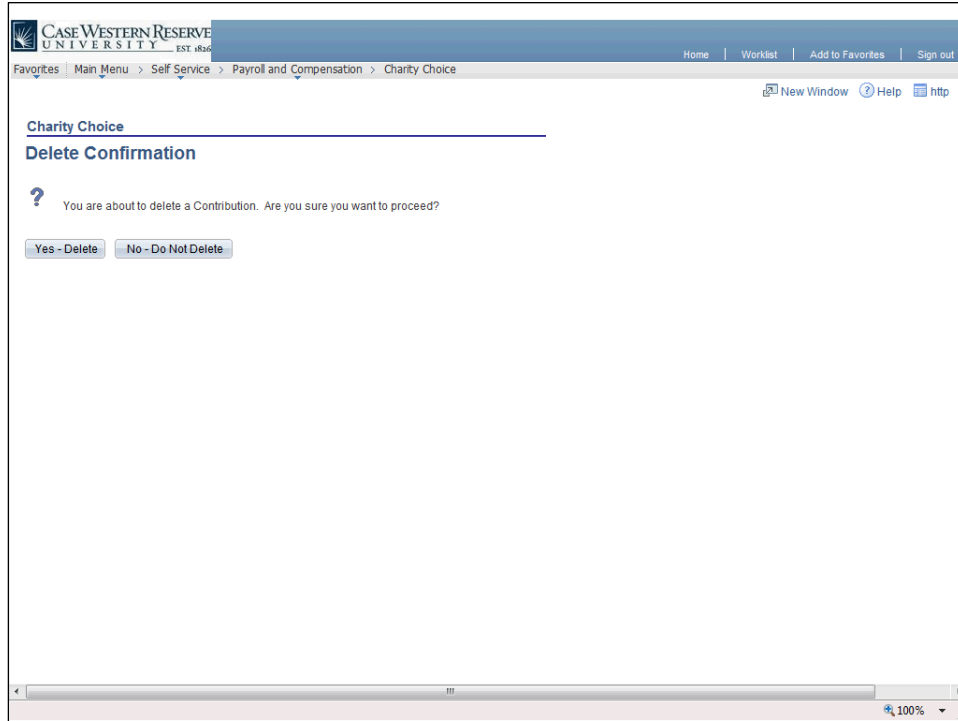
Contributions for 2012

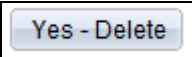
Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount
Earth Share of Ohio	Earth Share Ohio	25.00	1	25.00	See Below
Independent 501(c)(3)	OPEN M	25.00	1	25.00	Copy
2012 Calendar Year Total		50.00		50.00	

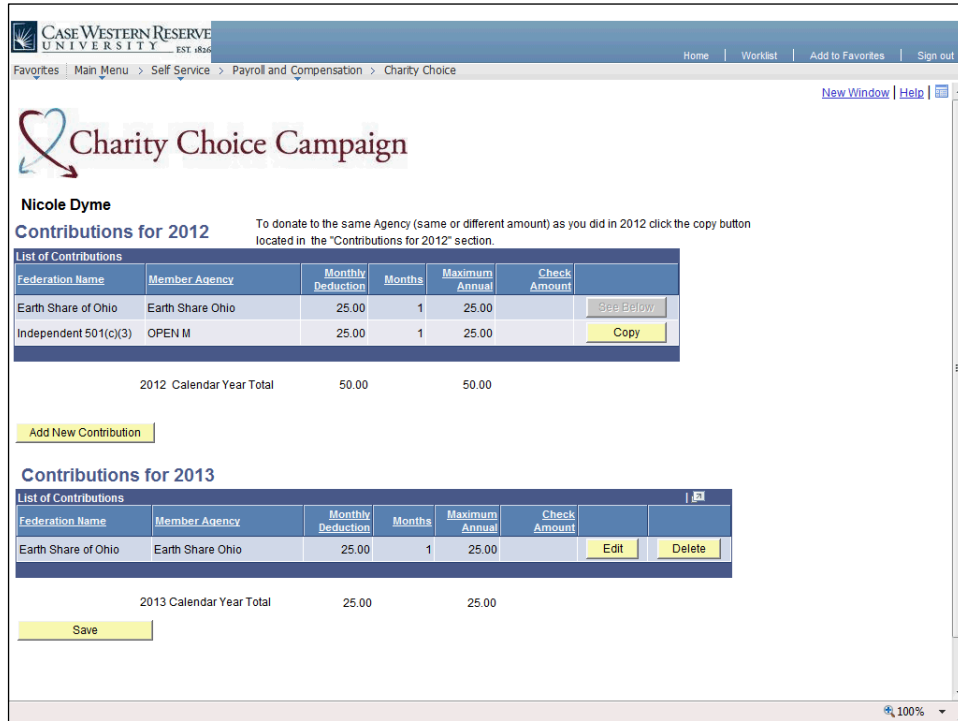
Contributions for 2013

Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount
Earth Share of Ohio	Earth Share Ohio	25.00	1	25.00	Edit Delete
2013 Calendar Year Total		25.00		25.00	

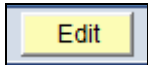
Step	Action
7.	To remove a contribution from your list for the upcoming year, click the Delete button to the right of the entry.
	

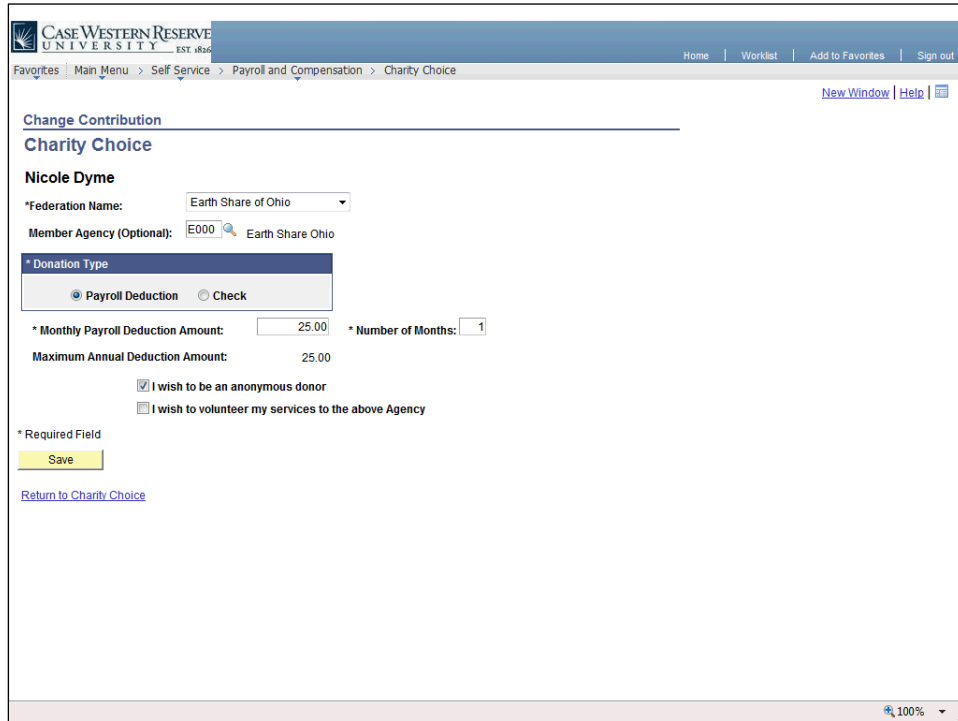


Step	Action
8.	Click the Yes - Delete button to confirm the removal of your contribution details. <div style="text-align: center; margin-top: 10px;">  </div>



The screenshot shows the 'Charity Choice Campaign' interface for user Nicole Dyme. It features two sections: 'Contributions for 2012' and 'Contributions for 2013'. The 2012 section includes a table with columns for Federation Name, Member Agency, Monthly Deduction, Months, Maximum Annual, and Check Amount. It lists two contributions: Earth Share of Ohio and Independent 501(c)(3). A 'Copy' button is visible next to the second entry. Below the table is a '2012 Calendar Year Total' row showing 50.00 for both Monthly Deduction and Maximum Annual. An 'Add New Contribution' button is located below the 2012 section. The 2013 section has a similar table with one entry for Earth Share of Ohio. It includes 'Edit' and 'Delete' buttons for this entry. A '2013 Calendar Year Total' row shows 25.00 for both Monthly Deduction and Maximum Annual. A 'Save' button is located below the 2013 section. The interface also includes a navigation menu at the top and a 'New Window | Help' link.


Step	Action
9.	To update or change the contribution details, click the Edit button. <div style="text-align: center; margin-top: 10px;">  </div>

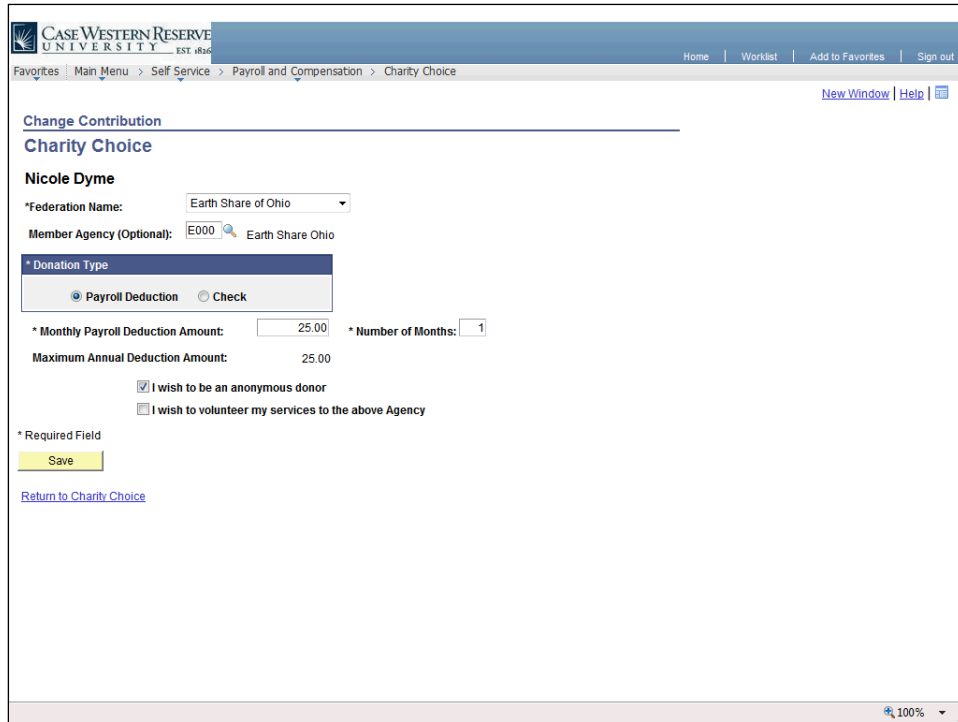


CASE WESTERN RESERVE UNIVERSITY EST. 1826
 Home | Worklist | Add to Favorites | Sign out
 Favorites | Main Menu > Self Service > Payroll and Compensation > Charity Choice
[New Window](#) | [Help](#)

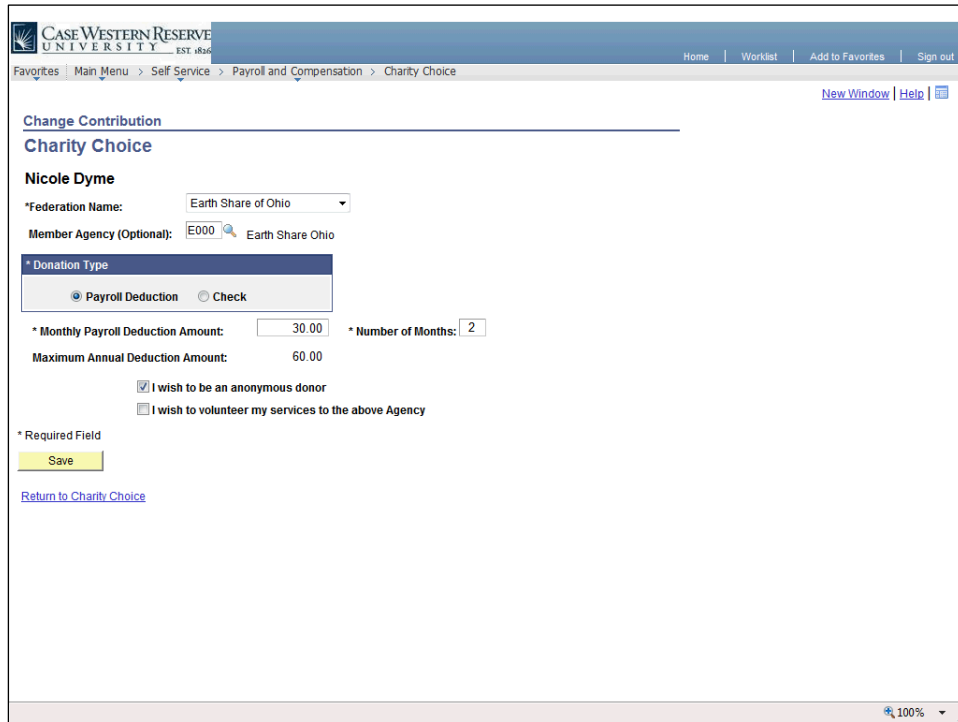
Change Contribution
Charity Choice
Nicole Dyme
 *Federation Name: Earth Share of Ohio
 Member Agency (Optional): E000 Earth Share Ohio
 * Donation Type
 Payroll Deduction Check
 * Monthly Payroll Deduction Amount: 25.00 * Number of Months: 1
 Maximum Annual Deduction Amount: 25.00
 I wish to be an anonymous donor
 I wish to volunteer my services to the above Agency
 * Required Field

[Return to Charity Choice](#)

Step	Action
10.	<p>The Change Contribution screen appears.</p> <p>If applicable, the Member Agency field can be updated. Click on the magnifying glass to view the list of available agencies.</p> <div data-bbox="370 1476 841 1535" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Member Agency (Optional): E000 </p> </div>



Step	Action
11.	<p>The Donation Type can be set to either Payroll Deduction or Check. Click the radio button next to the desired contribution method.</p> <div data-bbox="370 1409 862 1528" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>* Donation Type</p> <p> <input checked="" type="radio"/> Payroll Deduction <input type="radio"/> Check </p> </div> <p>Note: When the Check option is selected, the system will track the donation but does not deduct any money from your pay.</p> <p>To Pay by Check: Enter the appropriate amount into the Amount Paid by Check field and click the Save button. The system will provide you with an address to mail in your donation check.</p>



CASE WESTERN RESERVE UNIVERSITY EST. 1826
 Home | Worklist | Add to Favorites | Sign out
 Favorites | Main Menu > Self Service > Payroll and Compensation > Charity Choice

[New Window](#) | [Help](#)

Change Contribution
Charity Choice
Nicole Dyme
 *Federation Name: Earth Share of Ohio
 Member Agency (Optional): E000 Earth Share Ohio

*** Donation Type**
 Payroll Deduction Check

* Monthly Payroll Deduction Amount: 30.00 * Number of Months: 2
 Maximum Annual Deduction Amount: 60.00

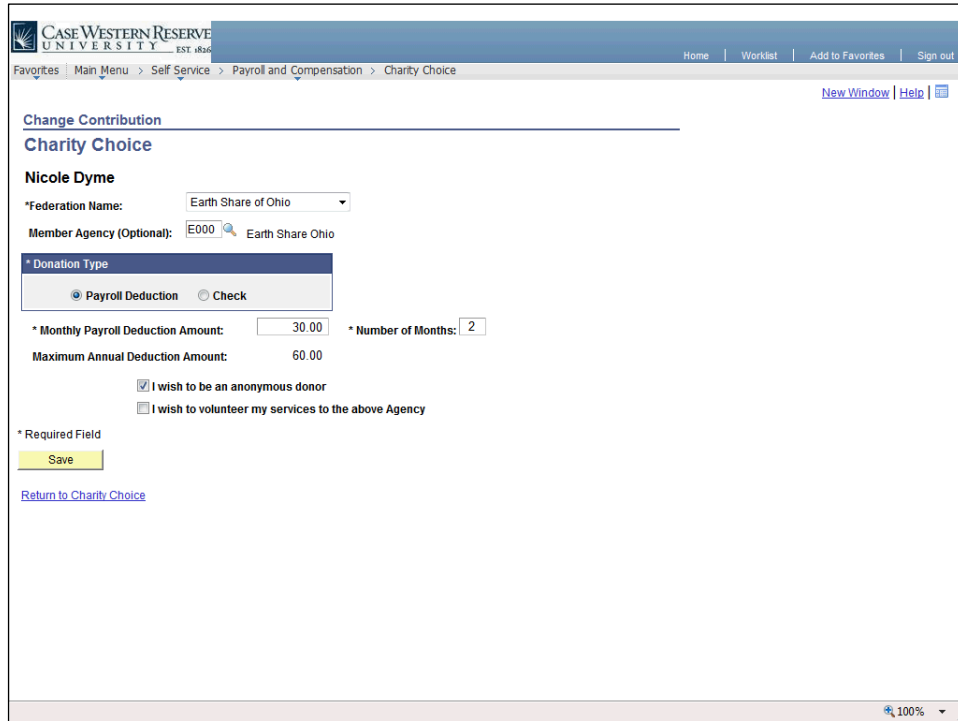
I wish to be an anonymous donor
 I wish to volunteer my services to the above Agency

* Required Field

[Return to Charity Choice](#)

100%

Step	Action
12.	<p>If the Payroll Deduction option is selected, the Monthly Payroll Deduction Amount can be updated to reflect an increase or decrease in the amount to be donated.</p> <p>The Maximum Annual Deduction Amount will update to reflect any changes made to the deduction amount and number of months, (\$30.00 x 2 months = \$60.00.)</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p> * Monthly Payroll Deduction Amount: 30.00 * Number of Months: 2 Maximum Annual Deduction Amount: 60.00 </p> </div>

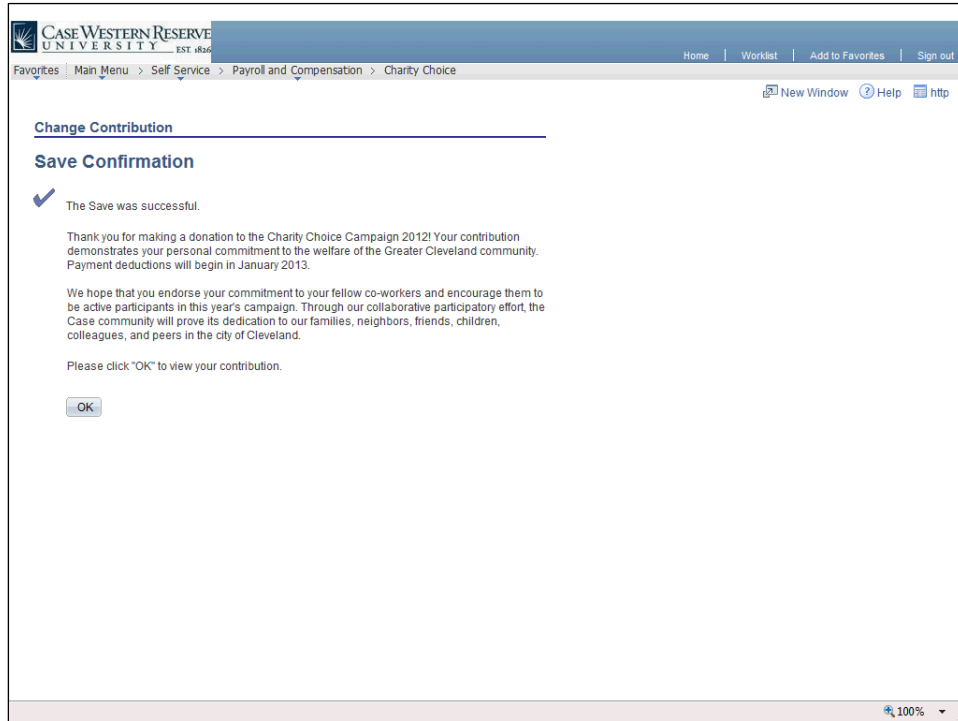



The screenshot shows a web browser window with the Case Western Reserve University logo and navigation links. The page title is "Change Contribution" and the sub-page is "Charity Choice". The user's name is "Nicole Dyme".

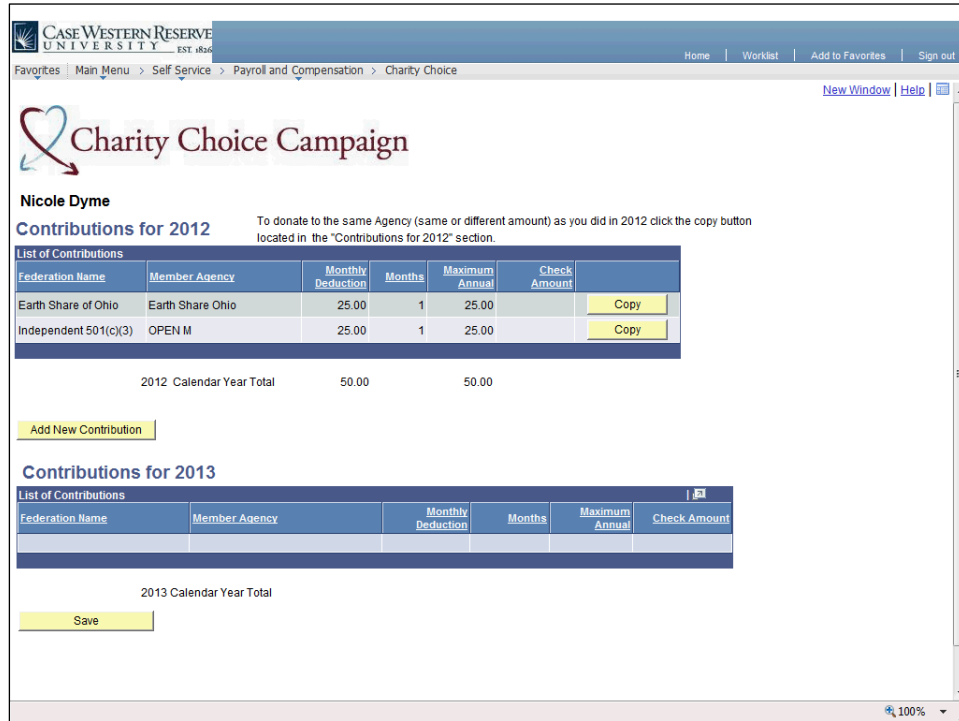
Fields and options visible:

- Federation Name:** Earth Share of Ohio (dropdown menu)
- Member Agency (Optional):** E000 Earth Share Ohio (searchable text field)
- Donation Type:** Radio buttons for "Payroll Deduction" (selected) and "Check".
- * Monthly Payroll Deduction Amount:** 30.00 (text input)
- * Number of Months:** 2 (text input)
- Maximum Annual Deduction Amount:** 60.00
- Options:**
 - I wish to be an anonymous donor
 - I wish to volunteer my services to the above Agency
- * Required Field:** Save (button)
- [Return to Charity Choice](#) (link)

Step	Action
13.	<p>You can select the I wish to be an anonymous donor option or the I wish to volunteer my services to the above Agency option by clicking the associated check box.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <input type="checkbox"/> I wish to be an anonymous donor <input checked="" type="checkbox"/> I wish to volunteer my services to the above Agency </div>
14.	<p>Click the Save button.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <input type="button" value="Save"/> </div>

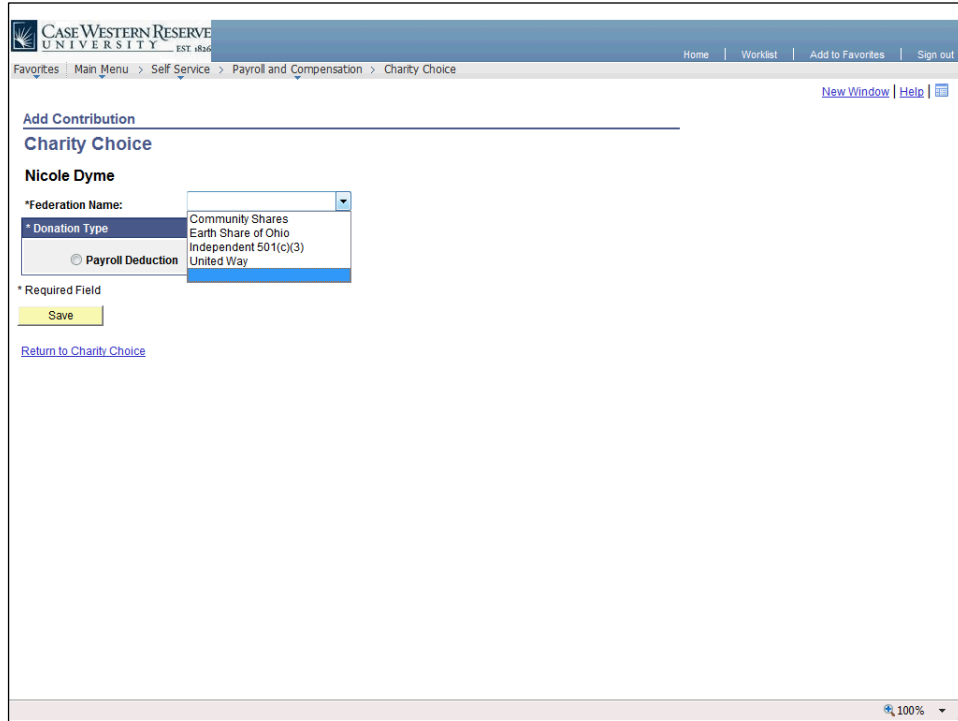


Step	Action
15.	The Save Confirmation screen appears. Click the OK button. <div style="text-align: center; margin-top: 10px;">  </div>



The screenshot shows the 'Charity Choice Campaign' interface for user Nicole Dyme. It features a navigation bar at the top with links for Home, Worklist, Add to Favorites, and Sign out. Below the navigation is a breadcrumb trail: Favorites | Main Menu > Self Service > Payroll and Compensation > Charity Choice. The main heading is 'Charity Choice Campaign' with a heart icon. The user's name 'Nicole Dyme' is displayed. Under 'Contributions for 2012', there is a table with columns: Federation Name, Member Agency, Monthly Deduction, Months, Maximum Annual, and Check Amount. Two rows are shown: Earth Share of Ohio and Independent 501(c)(3). A '2012 Calendar Year Total' row shows a total of 50.00. An 'Add New Contribution' button is visible below the table. The 'Contributions for 2013' section has an empty table and a 'Save' button. The browser status bar at the bottom indicates 100% zoom.

Step	Action
16.	<p>To add a new contribution to the list for the upcoming year, click the Add New Contribution button.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block; margin: 10px 0;"> <p style="background-color: #ffffcc; padding: 2px 10px;">Add New Contribution</p> </div>



CASE WESTERN RESERVE UNIVERSITY EST. 1826
 Home | Worklist | Add to Favorites | Sign out
 Favorites | Main Menu > Self Service > Payroll and Compensation > Charity Choice
[New Window](#) | [Help](#)

Add Contribution

Charity Choice

Nicole Dyme

*Federation Name:

* Donation Type: Payroll Deduction

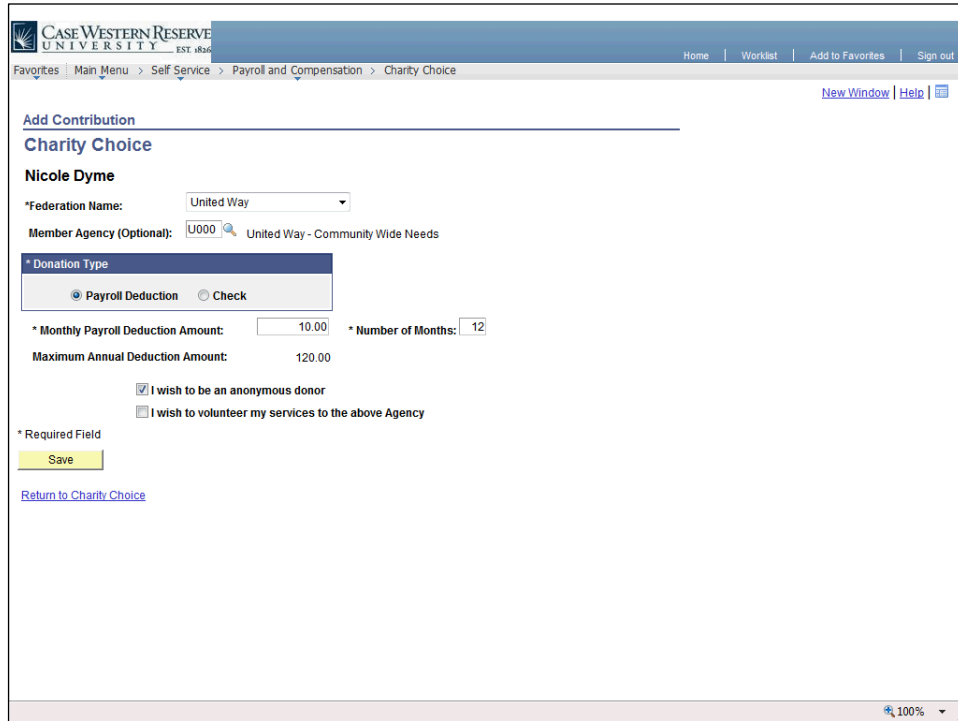
- Community Shares
- Earth Share of Ohio
- Independent 501(c)(3)
- United Way

* Required Field

[Return to Charity Choice](#)

100%

Step	Action
17.	<p>The Add Contribution screen appears.</p> <p>Click on the Federation Name drop down menu to select an entry from the list.</p> <p>Note: If the charity you want does not appear in the list, choose the Independent 501(c)(3) list item.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">*Federation Name:</div>




CASE WESTERN RESERVE UNIVERSITY EST. 1826 Home | Worklist | Add to Favorites | Sign out
 Favorites | Main Menu > Self Service > Payroll and Compensation > Charity Choice [New Window](#) | [Help](#)

Add Contribution

Charity Choice

Nicole Dyme

*Federation Name:

Member Agency (Optional):  United Way - Community Wide Needs

* Donation Type

Payroll Deduction Check

* Monthly Payroll Deduction Amount: * Number of Months:

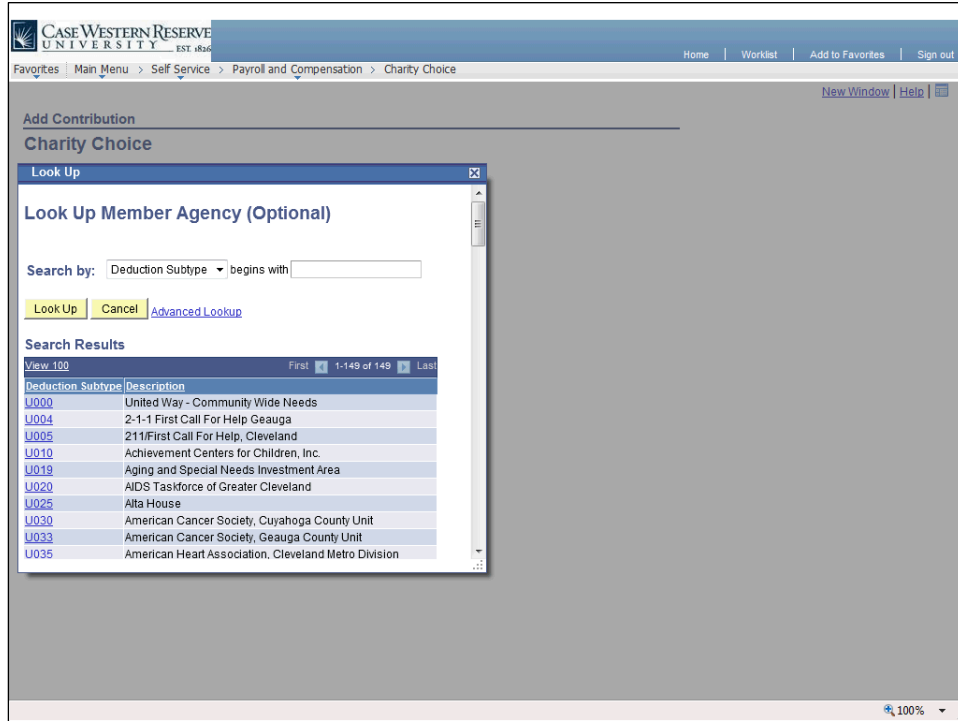
Maximum Annual Deduction Amount: 120.00


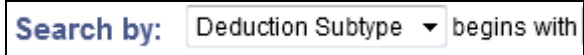
I wish to be an anonymous donor
 I wish to volunteer my services to the above Agency

* Required Field

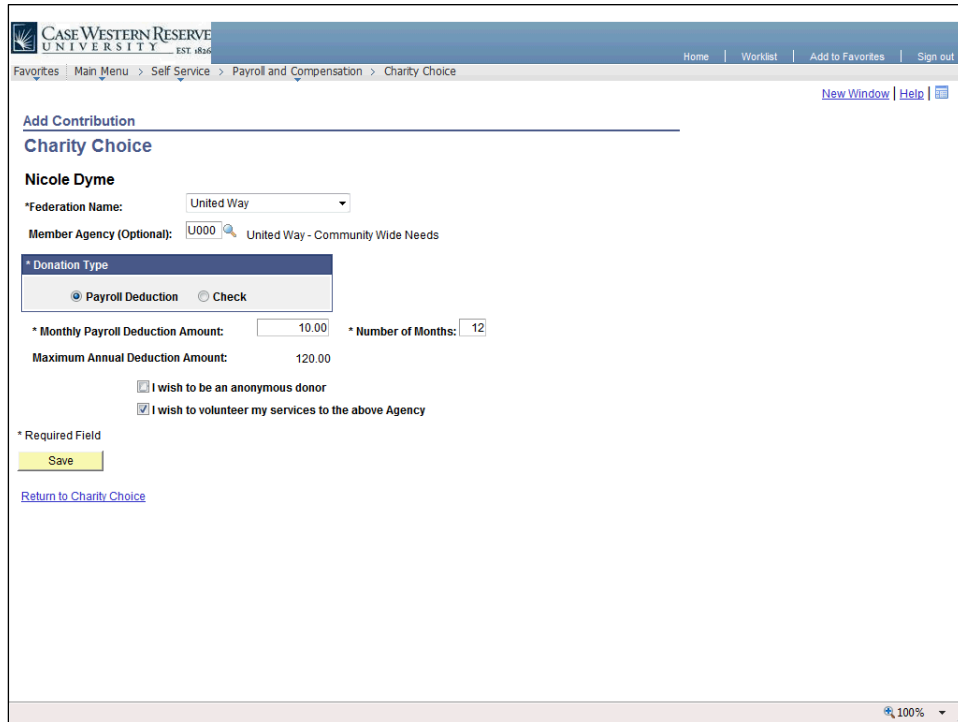
[Return to Charity Choice](#)

Step	Action
18.	<p>If you selected Community Shares, Earth Shares of Ohio or United Way from the Federation Name field, the Member Agency (Optional) field will appear. This field can be used to designate a specific agency to receive your contribution.</p> <p>Click the Look up Member Agency button (magnifying glass) to select an agency from the search results.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Member Agency (Optional): <input type="text" value="U000"/>  United Way - Community Wide Needs</p> </div>

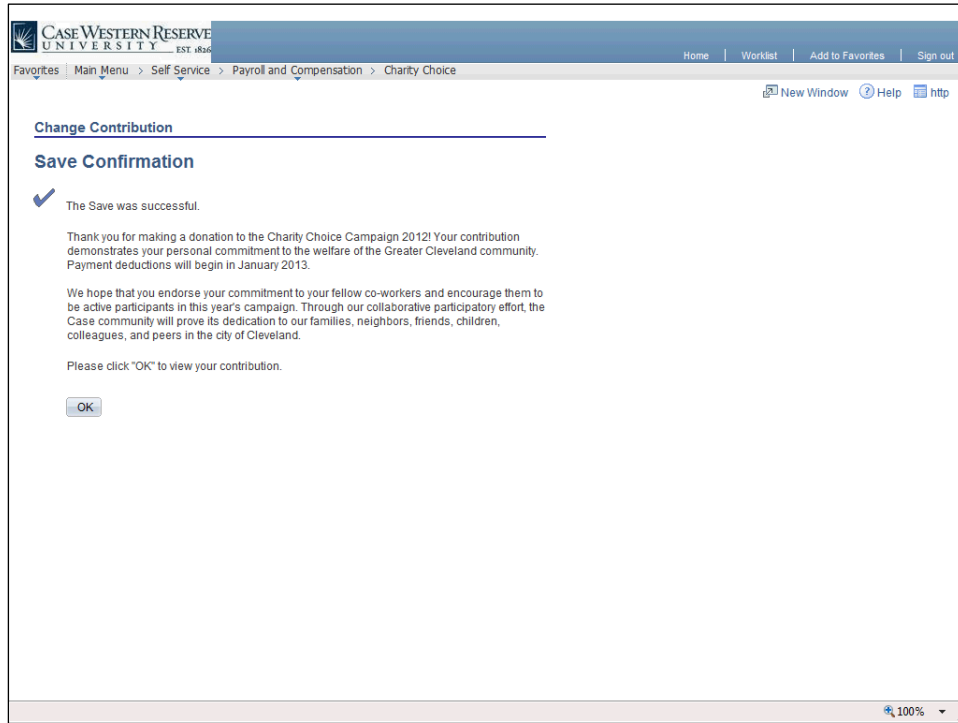



Step	Action
19.	Click on the link (in blue) beneath the Deduction Subtype column to select it. 
20.	You can type an entry into the Search by field to look for a specific agency. 

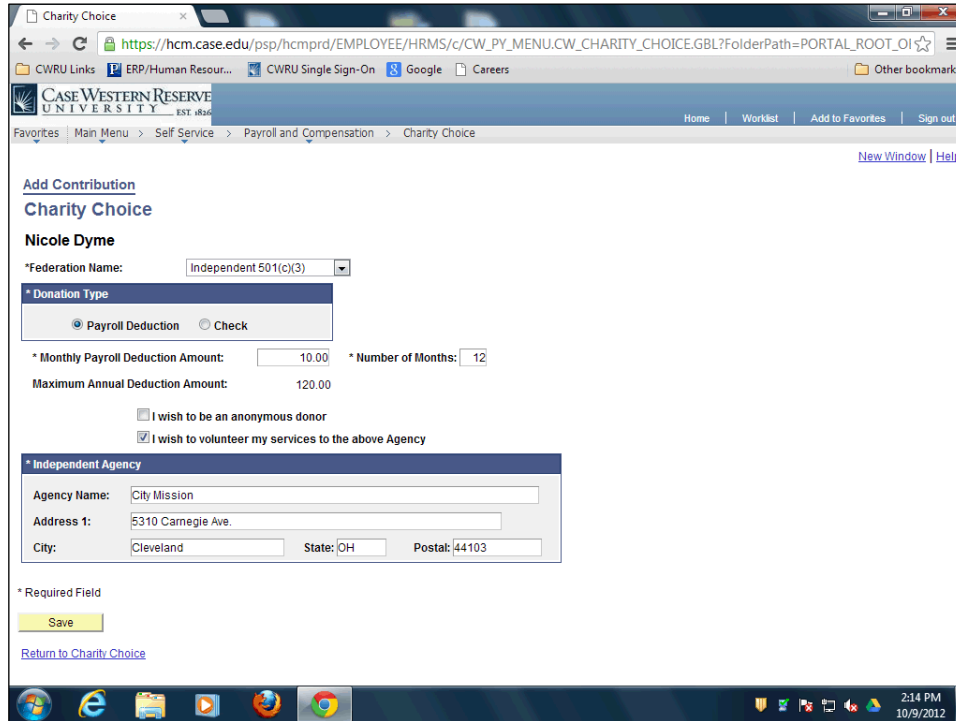
Step	Action
21.	<p>The Donation Type can be set to either Payroll Deduction or Check. Click the radio button next to the desired contribution method.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <p>* Donation Type</p> </div>
22.	<p>Enter the Monthly Payroll Deduction Amount and the Number of Months you wish to have this amount deducted from your pay.</p> <p>The Maximum Annual Deduction Amount will be equal to the Monthly Payroll Deduction Amount multiplied by the Number of Months.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;"> <p>* Monthly Payroll Deduction Amount: <input type="text" value="10.00"/> * Number of Months: <input type="text" value="12"/></p> <p>Maximum Annual Deduction Amount: 120.00</p> </div>



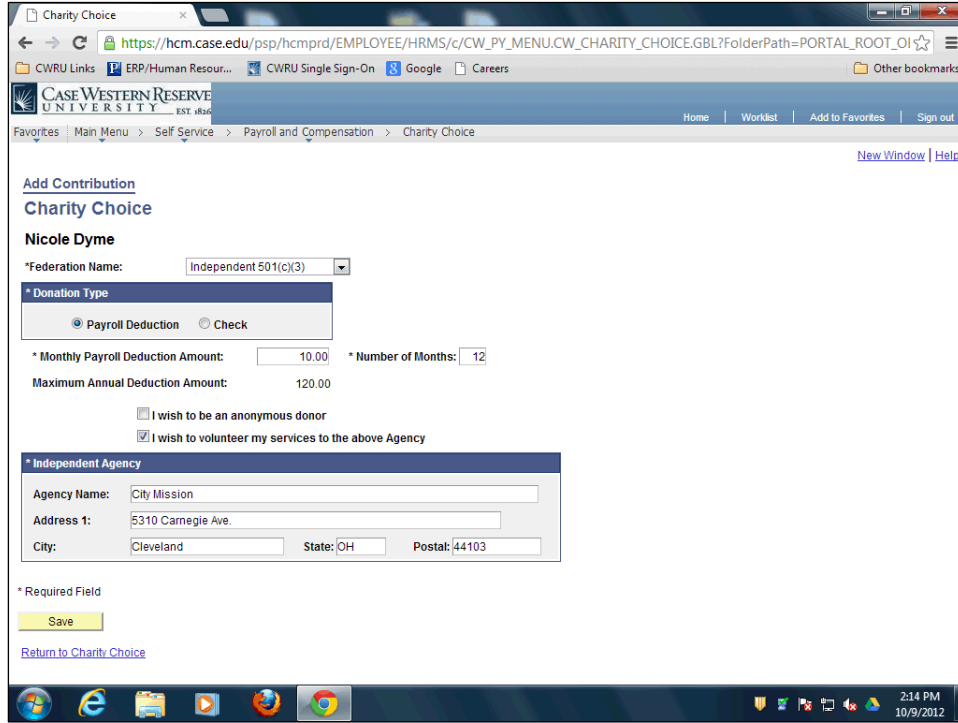
Step	Action
23.	<p>You can select the I wish to be an anonymous donor option or the I wish to volunteer my services to the above Agency option by clicking the associated check box.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <input type="checkbox"/> I wish to be an anonymous donor <input checked="" type="checkbox"/> I wish to volunteer my services to the above Agency </div>
24.	<p>Click the Save button.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <input type="button" value="Save"/> </div>





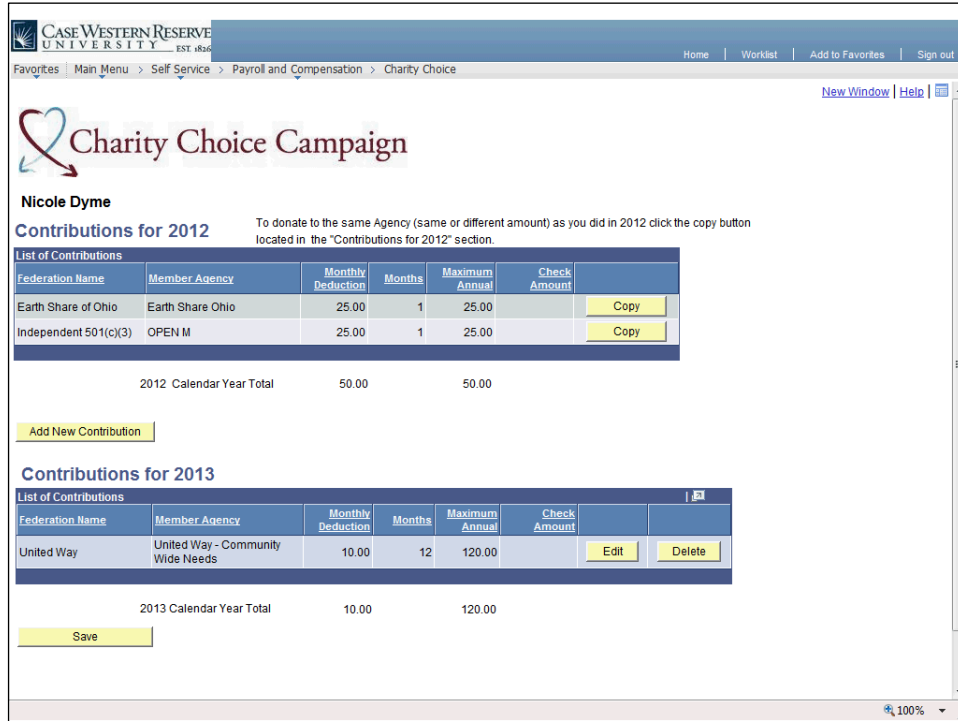
Step	Action
25.	The Save Confirmation screen appears. Click the OK button. <div style="text-align: center; margin-top: 10px;">  </div>



Step	Action
26.	<p>When the Independent 501(c)(3) option is selected from the Federation Name field, the Independent Agency address block will appear.</p> <p>Enter the appropriate information into the Agency Name, Address, City, State, and Postal (zip code) fields.</p> <div data-bbox="370 1539 646 1587" style="border: 1px solid black; padding: 2px; margin-top: 10px;"> <p>* Independent Agency</p> </div>



Step	Action
27.	Click the Save button. 
28.	When the Save Confirmation screen appears, click the OK button. 



The screenshot shows the 'Charity Choice Campaign' interface for user Nicole Dyme. It features two sections: 'Contributions for 2012' and 'Contributions for 2013'. The 2012 section includes a table with two rows of contributions and a total of 50.00. The 2013 section includes a table with one row of contribution and a total of 10.00. Buttons for 'Add New Contribution', 'Copy', 'Edit', 'Delete', and 'Save' are visible.

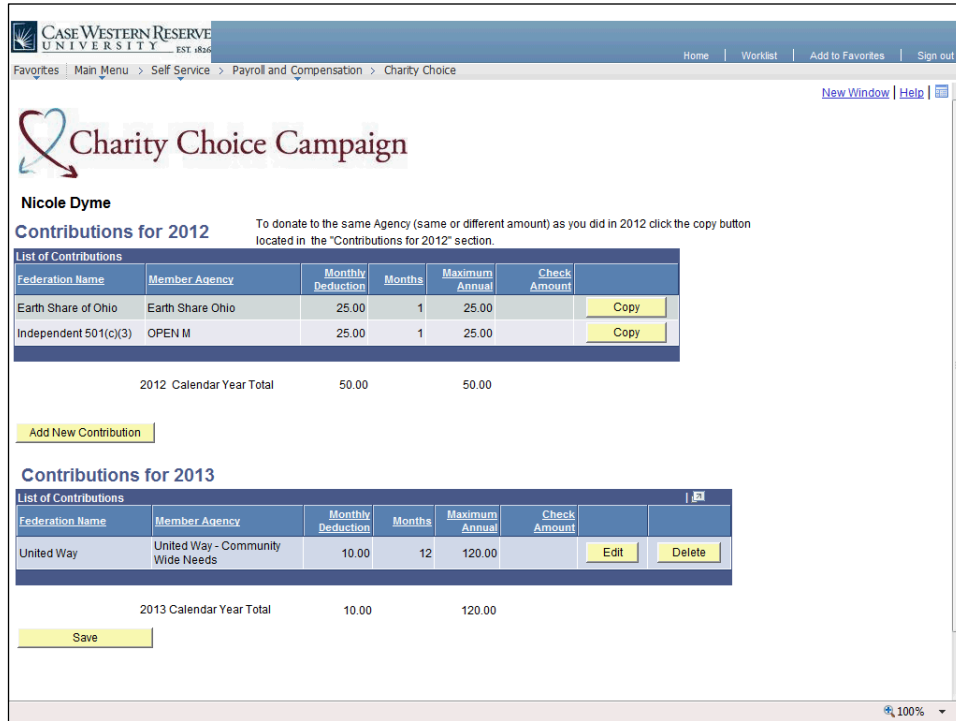
Contributions for 2012

Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount	
Earth Share of Ohio	Earth Share Ohio	25.00	1	25.00		Copy
Independent 501(c)(3)	OPEN M	25.00	1	25.00		Copy
2012 Calendar Year Total		50.00		50.00		

Contributions for 2013

Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount		
United Way	United Way - Community Wide Needs	10.00	12	120.00		Edit	Delete
2013 Calendar Year Total		10.00		120.00			

Step	Action
29.	<p>To add another new contribution for the upcoming year, click the Add New Contribution field again and repeat the preceding steps.</p> <p>You may donate to as many organizations as you wish.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-top: 10px;"> <p>Add New Contribution</p> </div>



The screenshot shows the 'Charity Choice Campaign' interface for user Nicole Dyme. It features a navigation bar at the top with links for Home, Worklist, Add to Favorites, and Sign out. Below the navigation is a breadcrumb trail: Favorites | Main Menu > Self Service > Payroll and Compensation > Charity Choice. The main heading is 'Charity Choice Campaign' with a heart icon. Below this, the user's name 'Nicole Dyme' is displayed, followed by a note: 'To donate to the same Agency (same or different amount) as you did in 2012 click the copy button located in the "Contributions for 2012" section.'

Contributions for 2012

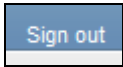
Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount	
Earth Share of Ohio	Earth Share Ohio	25.00	1	25.00		Copy
Independent 501(c)(3)	OPEN M	25.00	1	25.00		Copy
2012 Calendar Year Total		50.00		50.00		

Buttons: Add New Contribution

Contributions for 2013

Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount		
United Way	United Way - Community Wide Needs	10.00	12	120.00		Edit	Delete
2013 Calendar Year Total		10.00		120.00			

Buttons: Save

Step	Action
30.	Please remember to use the Sign out link when your session is finished. 
31.	End of Procedure.